PugetSoundPartnership

our sound, our community, our chance

The Action Agenda Performance Management System Overview and Update

Leadership Council Meeting

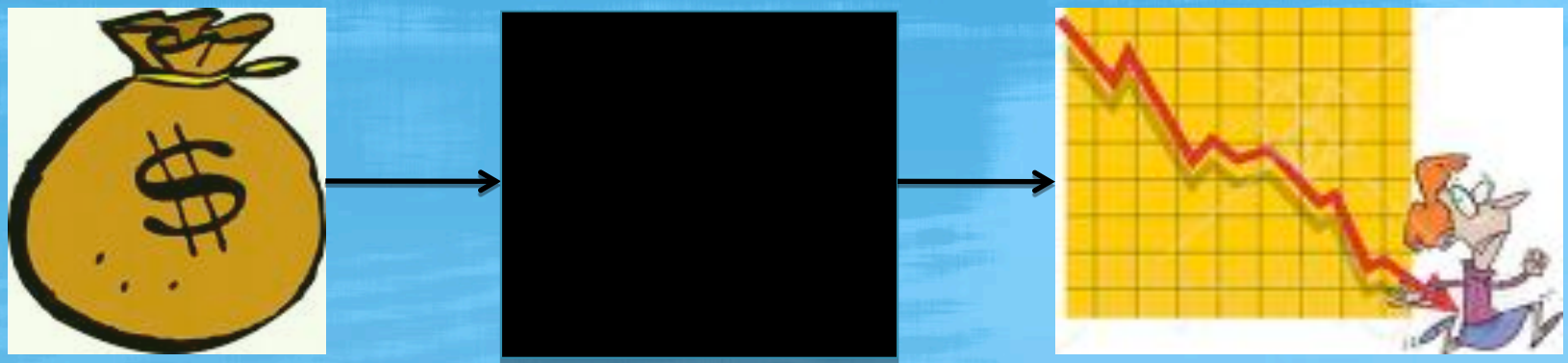
July 17, 2009

Today's Objectives

- Refresh the Leadership Council on the application of the Open Standards to the Action Agenda
- Present work done to date
- Review the path to the November 1 report
- Preview decisions that will come before the Leadership Council in the coming months

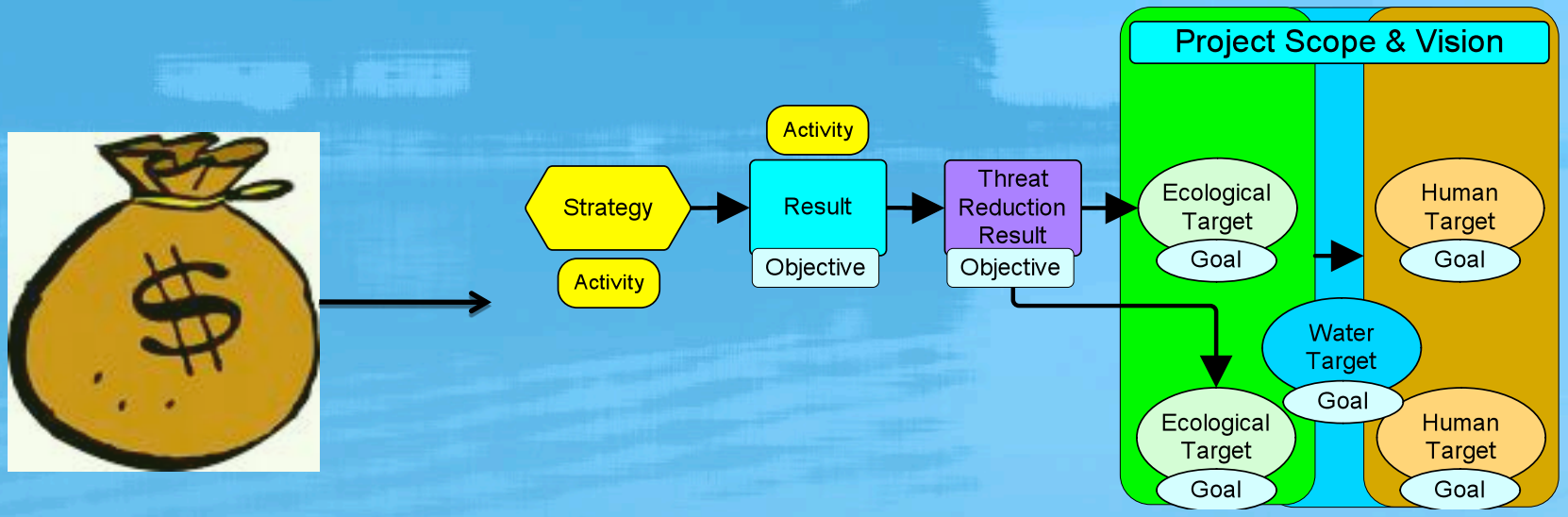
Why Use Performance Management?

The Worst Case Scenario



Why Use Performance Management?

Critical Elements of Performance Management



Budget Process

Results Chains For Strategies and Actions

Viability Analysis Status regarding 2020 Goals

Performance Management System
Why do we NEED one?

- Our enabling statute
- JLARC's audit of us against statute
- Gov. Gregoire's GMAP framework
- EPA and the federal performance system
- Benchmarking against Chesapeake Bay and others

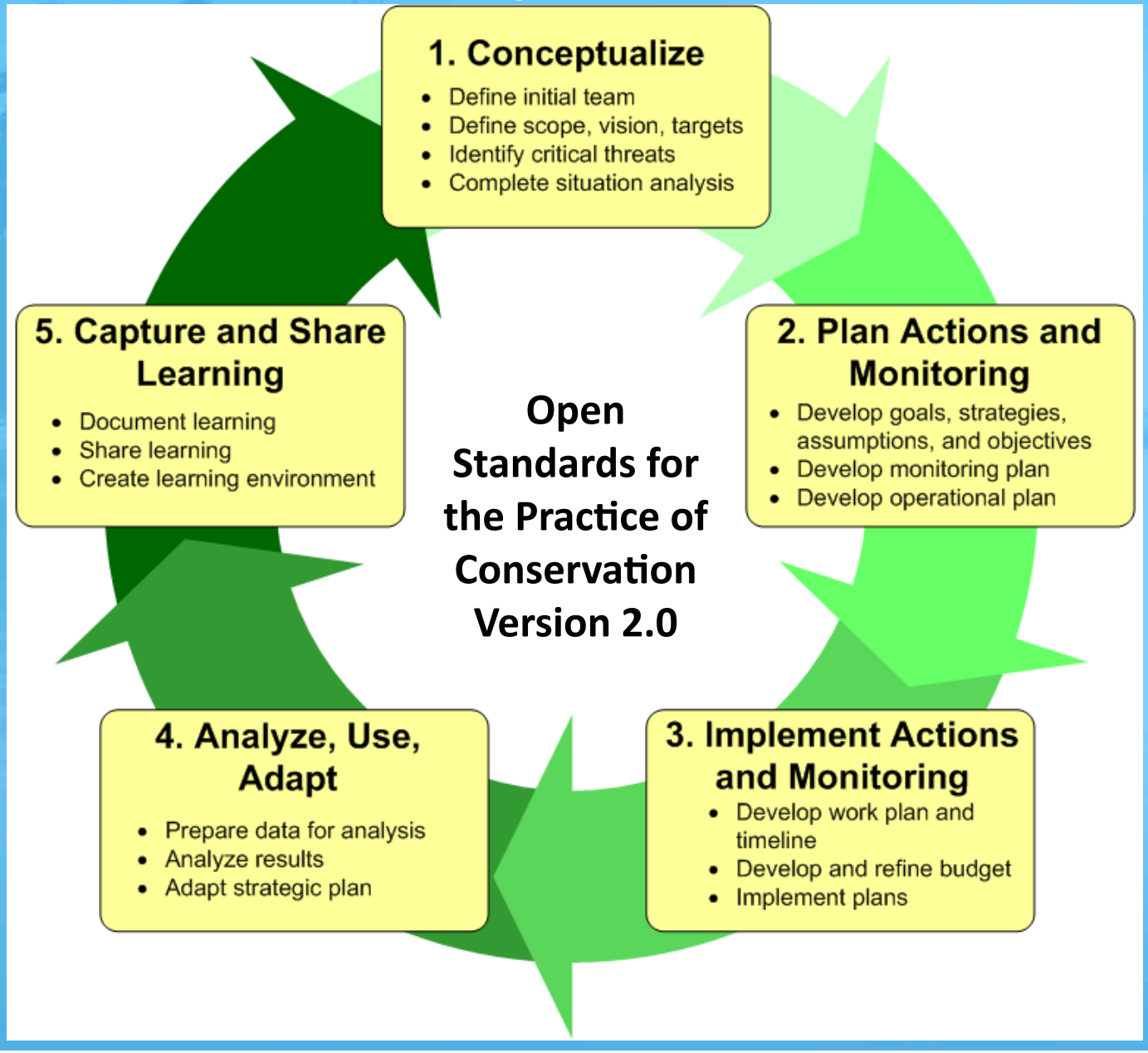
Performance Management System
Why do we WANT one?

- It documents our collective thinking
- Helps structure constructive dialogue around complex, contentious issues
- Improves the science/policy relationship
- Supports the inversion theory
- It focuses us on RESULTS
- It helps us learn

Performance Management System
What Is It?

- Operationalizes the Action Agenda
- Defines key processes for managing the life cycle of the Action Agenda
- Defines timelines, roles, responsibilities, products and reporting relationships
- Includes methods and tools such as results chains and work plan templates

We Will Use CMP's "Open Standards"



Three Key Processes
Adapted from the Open Standards

Setting Desired Conditions (Viability Analysis)

- Sets the goal posts for 2020
- Marks where we are on the field
- Makes legislative goals specific and measureable

Threat Ranking

- Provides relative ranking of threats to inform priorities for action
- Informs measures of progress in reducing threats
- Akin to a “scouting report”….

Three Key Processes
Adapted from the Open Standards (con't)

Benchmarks for Actions &
Developing Theories of Change (Results Chains)

- Makes assumptions behind choices of strategies and actions explicit, shows the theory of change, defines expected results
- Provides basis for choosing an objective and performance measure for accountability tracking
- The "playbook"

ftb_play www.fotosearch.com

What We've Done So Far…

- May 12-14 initial workshop with Foundations of Success on Viability and Threats analyses
- Viability Workgroups applying Open Standards to indicators of ecosystem status
- June 29 – July 1 Workshop on Strategies
- Science Panel engagement on the process
- Forming additional working groups to develop results chains around key strategies and near term actions to develop intermediate outcomes

Progress Made on November Deliverables

- The Science Panel endorsed indicators for the November 1 report
- We have a preliminary ranking of threats at the ecosystem scale
- We are poised to develop a subset of results chains
- We will soon distribute questionnaires to owners of Near Term Actions

Two Types of Monitoring Questions: Status vs Effectiveness

Status Questions (Viability & Threats Analyses)

1. How is the system we care about doing?
2. How are threats to the system changing?

Effectiveness Questions (Results Chains)

3. What should be our priority actions?
4. Are our actions getting done and having their intended impact?
5. How can we improve our actions over time?

Step 1

Define Project Scope & Vision

"The Action Agenda shall…address all geographic areas of Puget Sound including upland areas and tributary rivers and streams that affect Puget Sound…."

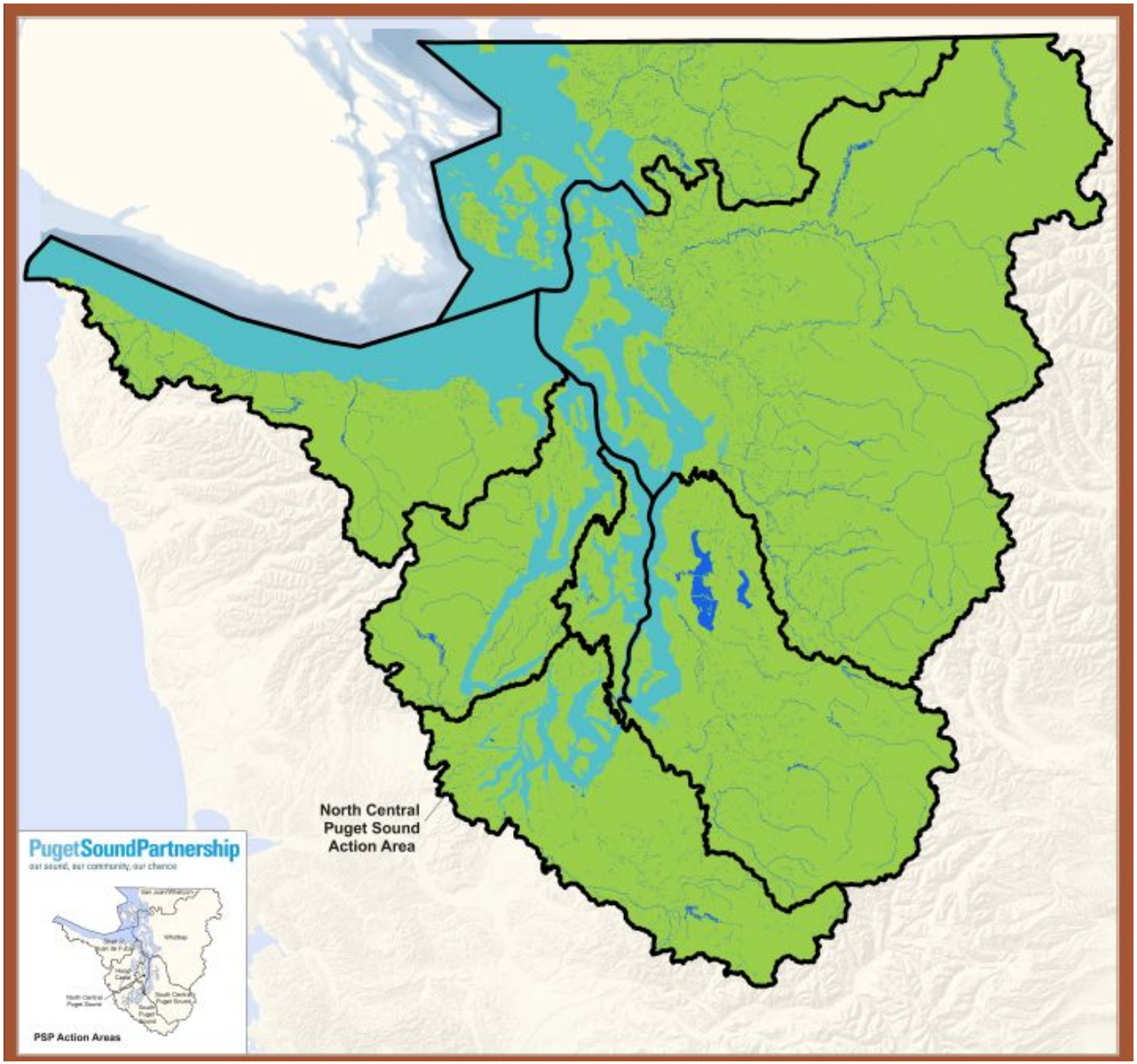
RCW 90.71.310

Interpreting Scope: Snowcaps to Whitecaps

A. Marine Waters Only

B. All Waters

C. Entire Watershed



Step 1

Define Project Scope & Vision

LC Decision

We need the LC to confirm the workshop's interpretation of the Geographic scope of the Action Agenda:

A + B + C

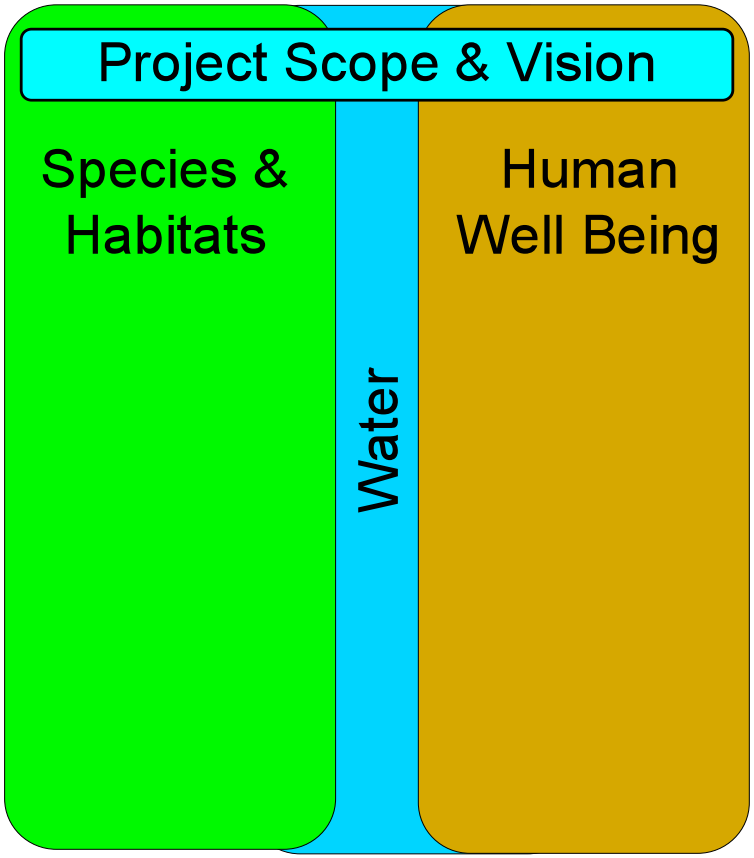
Note that this scope encompasses both Puget Sound-wide decisions as well as action areas, watersheds, and political subdivisions.

Step 1 Define Project Scope & Vision

- **Vision Given to PSP**
- **PSP's Task** – Make the legislative goals specific, measureable and time bound

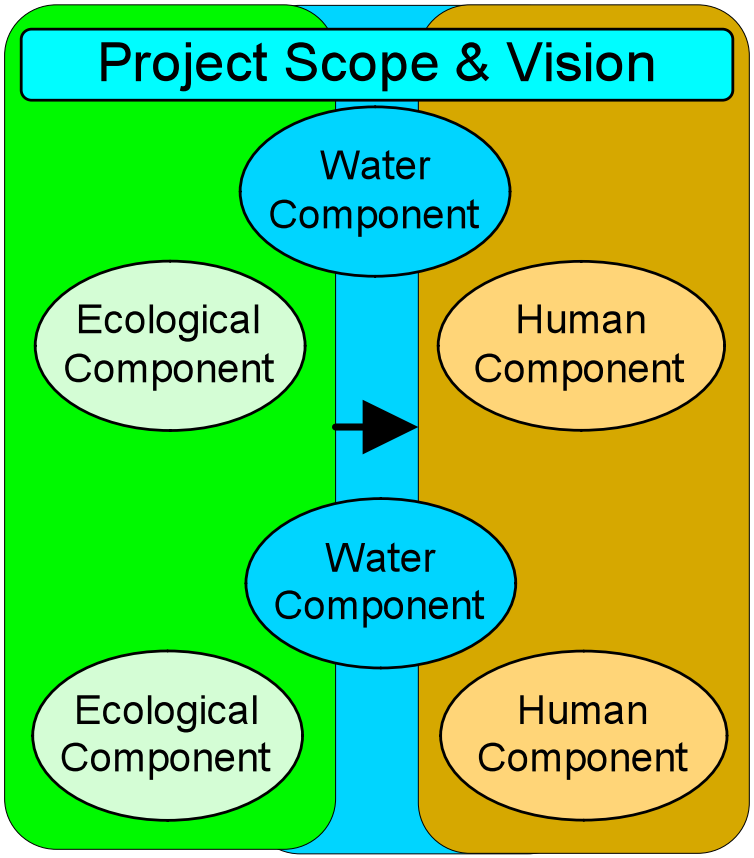
Step 1

Define "Focal Components": Key Elements of the System (aka "Targets")



Step 1

Define "Focal Components": Key Elements of the System (aka "Targets")



Step 1

Proposed "Focal Components" Define Our Legislative Goals

Habitats

- Marine waters
- Marine shorelines
- River deltas and coastal embayments
- Freshwater systems
  - Streams
  - Wetlands
  - Lakes
- Terrestrial systems

Species & Food Webs

- Marine mammals
- Marine birds
- Marine fish
- Marine invertebrates
- Salmon
- Terrestrial birds
- Food webs
  - Marine
  - Freshwater
  - Terrestrial

Water

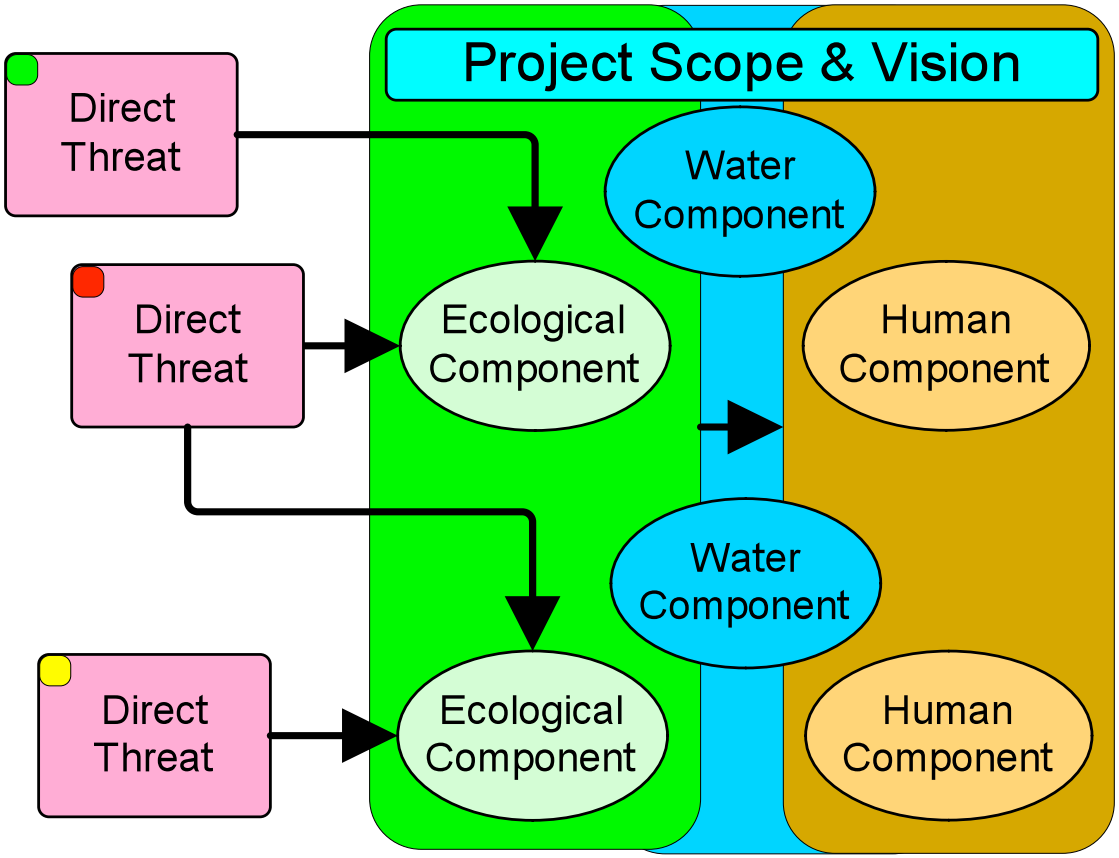
- **Water quantity**
- **Water quality**
  - Marine
  - Freshwater
  - Species

Human Dimensions

- **Human health**
- Built environment
- Working marine industries
- Working resource lands & industries
- Nature oriented recreation
- Scenic resources / existence values
- Tribal values and resources

Step 1

Identify and Prioritize Critical Threats



Step 1

Rating of Threats on Components Scope, Severity, Irreversibility

Rank	Threats	Marine Birds	Marine Fish	Marine Mammals	Marine Invertebrates	Marine Shorelines	Marine Waters	River Deltas & Coastal Embayments	Freshwater Habitats	Terrestrial Birds	Terrestrial Habitats	Summary Threat Rating
1	Climate Change	High	High	High	High	Very High	Very High	Very High	Very High	High	High	Very High
2	Residential, Commercial, Port & Shipyard Development					Very High		Very High	High	High	High	Very High
3	Dams, Levees & Tidegates					Medium		Medium	High			High
4	Invasives- Terrestrial								High	Medium	Very High	High
5	Invasives-Freshwater								Very High			High
6	Non-Point Source Loading & Runoff		Medium		Medium	Medium	Medium	High	High			High
7	Roads, Transportation & Utility Infrastructure					High		Medium	Medium	Medium	High	High
8	Shoreline Armoring					High		High	High			High
9	Unsustainable Fishing / Harvesting		High		Medium							High
10	Air Pollution & Atmospheric Deposition		Medium		Medium		Medium		Low			Medium
11	Invasives-Marine	Medium			Low	Low	Low	Medium				Medium
12	Large Scale Timber Harvest								Medium	Medium	Medium	Medium
13	Oil & Hazardous Spills	Medium	Low	Low	Medium	Low	Low	Low	Low			Medium
14	Onsite Sewage Systems					Medium	Medium	Low	Low			Medium
15	Recreational Activities	Low	Medium	Low	Low	Low		Low	Medium	Low	Low	Medium
16	Recreational Marinas		Low			Low		Medium	Low			Medium
17	Water Withdrawals & Diversions							Medium	Medium			Medium
18	Agriculture & Livestock Grazing								Medium		Low	Low
19	Aquaculture					Low	Low	Low				Low
20	Derelict Gear & Vessels	Low	Low	Low		Low	Low	Low				Low
21	Dredging & Dredged Material Disposal					Low	Low	Medium	Low			Low
22	Military Exercises					Low	Low			Low	Low	Low
23	Mineral / Gravel Mining								Low		Low	Low
24	Point Source Pollution		Low		Low	Medium	Low	Low	Low			Low
25	Vessel Traffic & Interaction			Low								Low
26	Wastewater Treatment Plant Discharge & CSOs				Medium	Low	Low	Low	Low			Low

Step 1

Summary Ratings of Threats

- Overall Ratings for PSP-Wide Threats
- Cross Checked with Action Area Ratings

Rank	THREAT	Regional Summary Threat Rating
1	Climate Change	Very High
2	Residential, Commercial, Port & Shipyard Development	Very High
3	Shoreline Armoring	High
4	Roads, Transportation & Utility Infrastructure	High
5	Dams, Levees & Tidegates	High
6	Non-Point Source Loading & Runoff	High
7	Invasives- Terrestrial	High
8	Unsustainable Fishing / Harvesting	High
9	Invasives-Freshwater	High
10	Large Scale Timber Harvest	Medium
11	Water Withdrawals & Diversions	Medium
12	Oil & Hazardous Spills	Medium
13	Invasives-Marine	Medium
14	Onsite Sewage Systems	Medium
15	Air Pollution & Atmospheric Deposition	Medium
16	Recreational Activities	Medium
17	Recreational Marinas	Medium
18	Dredging & Dredged Material Disposal	Low
19	Aquaculture	Low
20	Derelict Gear & Vessels	Low
21	Mineral / Gravel Mining	Low
22	Agriculture & Livestock Grazing	Low
23	Wastewater Treatment Plant Discharge & CSOs	Low
24	Point Source Pollution	Low
25	Vessel Traffic & Interaction	Low
26	Military Exercises	Low

Step 1

Summary Ratings of Threats

- Overall Threat Ratings for Ecological Components

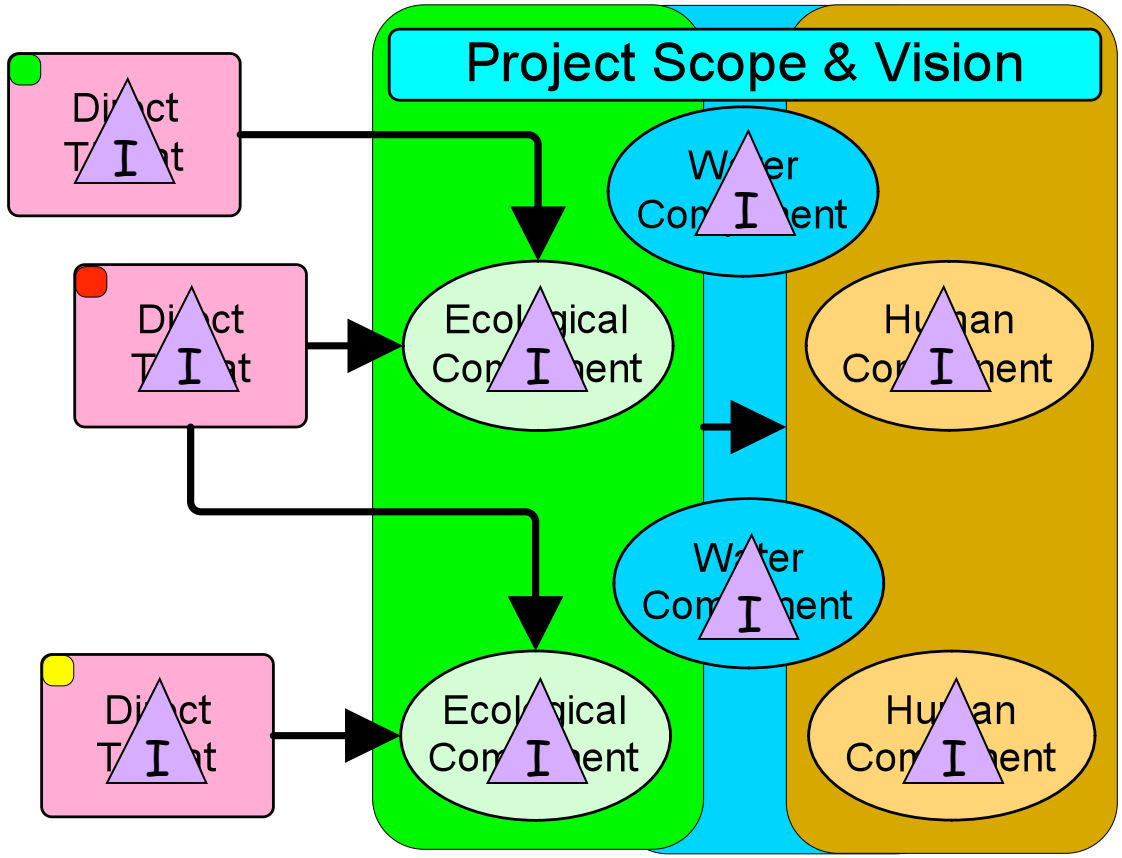
	Terrestrial Habitats	Freshwater Habitats	River Deltas & Coastal Embayments	Marine Shorelines
Summary Regional Threat Rating	Very High	Very High	Very High	Very High

	Marine Fish	Marine Invertebrates	Marine Waters	Terrestrial Birds
Summary Regional Threat Rating	High	High	High	High

	Marine Mammals
Summary Regional Threat Rating	Medium

Step 1

Components and Threats Used to Define "Status Indicators" of System



Step 1

Complete Viability Analysis for Status Indicators

- Define the fundamental elements of a healthy ecosystem
- Identify the current health of the system's components
- Set appropriate and measurable goals for desired future conditions
- Develop monitoring plans

Step 1 Definitions for Viability Analysis

COMPONENT (*aka "Target"*)

Element of the system that we care about

ATTRIBUTE (aka "KEA")

Aspect of a component that, if missing or altered, would lead to the loss of that component over time (thus define the component's viability or integrity)

INDICATOR

Measurable entity related to a specific information need such as the status of key attributes

Step 1

Relationship Between Components, Attributes & Indicators

GOAL: Puget Sound is ok

Component represents **Puget Sound Ecosystem**

If components are ok, then

Attributes represent **Component**

if attributes are ok, then

Indicators represent **Attributes**

if indicators are ok, then

Step 1

Viability & Threats Analyses Used to Define "Status Indicators" of System

- For November Report, Science Panel recommends using short-list of indicators related to our goals

Step 1

Viability & Threats Analyses Used to Define "Status Indicators" of System

Goal	Broad Indicator Name	#	Specific Recommended Indicators	Identified by Science Panel (SP) or Washington Monitoring Forum (WMF)
Species & Food Webs	Status and Trend of Keystone Species	5a	Productivity: Herring (SP)	SP
		5b	Salmon abundance (wild and hatchery?) (WMF)	WMF
		5c	Salmon abundance (wild and hatchery?) - listed species (WMF)	WMF
	Species at Risk	6	# of species at risk	SP
	Food Web Health (Status?)	7	Trophic index	SP
			Jelly Fish Abundance	SP
Habitats	Land Cover & Land Use	8	LULC general class extent	SP & WMF
	Status of Freshwater Animal Communities	9	In-stream biological health - Macro-invertebrates or Periphyton (WMF)	WMF
	Habitat Suitability for Salmon	10a	Habitat Quality Index - Stream Physical Character (WMF)	WMF
		10b	Habitat Quality Index - Riparian vegetation (WMF)	WMF
		10c	Habitat Quality Index - In-stream habitat (WMF)	WMF
	Habitat Quality	11	Sediment Measures (WMF)	WMF
	Habitat Connectivity	12	Connectivity and fragmentation	SP

Step 1

Viability & Threats Analyses Used to Define "Status Indicators" of System

Goal	Broad Indicator Name	#	Specific Recommended Indicators	Identified by Science Panel (SP) or Washington Monitoring Forum (WMF)
Water Quantity	Changes in Stream Flow	13a	Stream Flow - % of time in stream flows (as established in rule) are met during salmon critical period) (WMF)	WMF
		13b	Environmental flow (base flow)	SP
	Hydrologic Regime	14	Flooding	SP
		15	Storm event runoff (fraction of water through impervious landscape)	WMF
Water Quality	Chemical Contamination	16	contaminants in different media	SP
	Water Quality Index	17	WQI by region/province (NPCC province)	SP & WMF

Goal	Broad Indicator Name	#	Specific Recommended Indicators	Identified by Science Panel (SP) or Washington Monitoring Forum (WMF)
Human Health	Seafood Advisories	1a	Index for shellfish closures	SP
		1b	Index for consumption advisories	SP
	Safety of Public Drinking Water	2	Safety of drinking water	SP
Human Wellbeing	Working Resource-based Lands & Industries	3	Working resource lands & industries	SP
	Nature-based Recreation	4	Nature-based recreation	SP

Step 1

Path Forward for "Status Indicators" of the System

Today

LC Decision

- Confirm general plan from Science Panel

July - August

- Convene PMAG to provide oversight
- Give charge to status indicator workgroups to use Miradi tool to develop specific attributes, indicators, current status & (where possible) recommend desired future condition

September - October

- Review results and confirm desired future condition assessments
- Develop November report

LC Decision

Two Types of Monitoring Questions: Status vs Effectiveness

Status Questions (Viability & Threats Analyses)

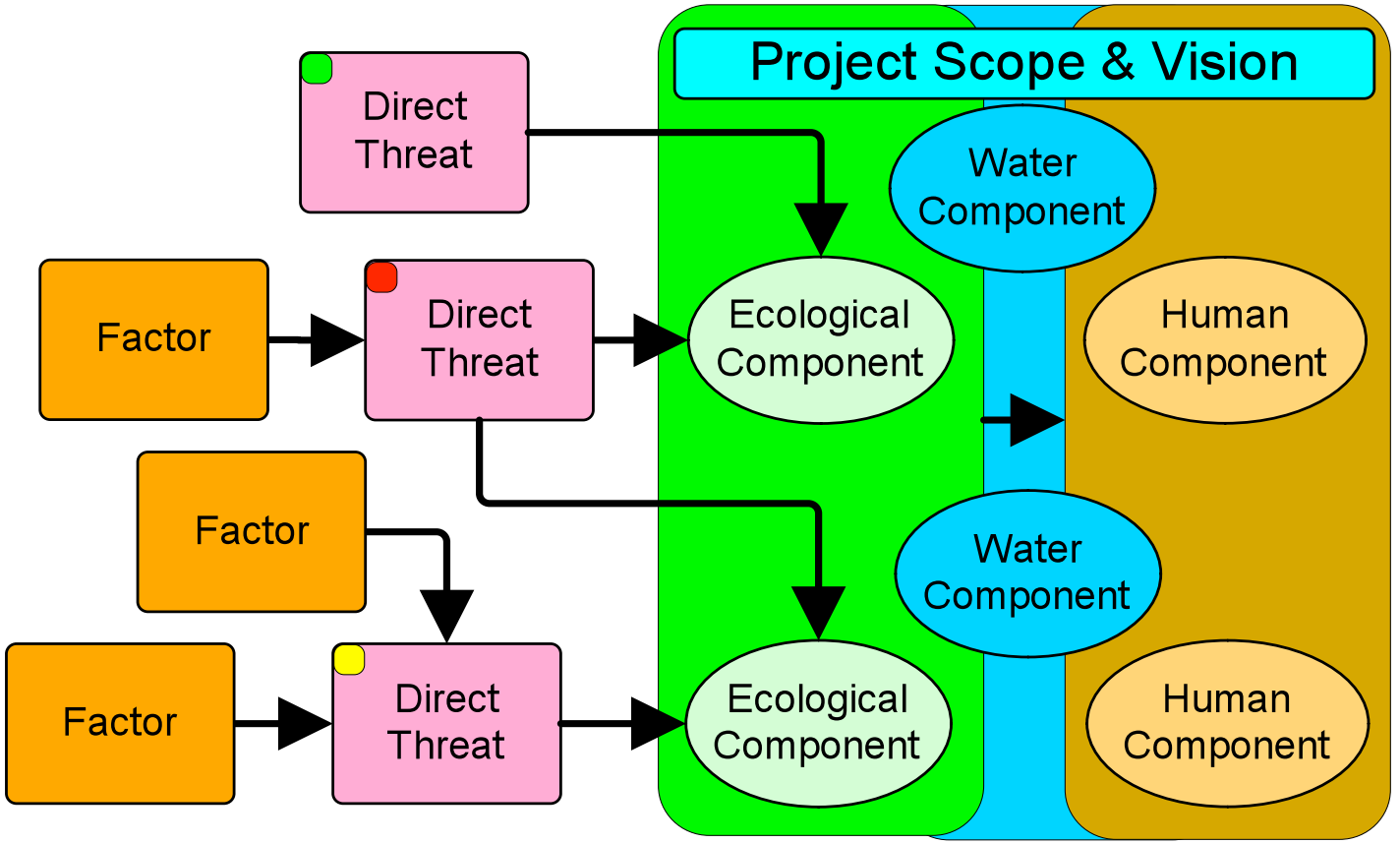
1. How is the system we care about doing?
2. How are threats to the system changing?

Effectiveness Questions (Results Chains)

3. What should be our priority actions?
4. Are our actions getting done and having their intended impact?
5. How can we improve our actions over time?

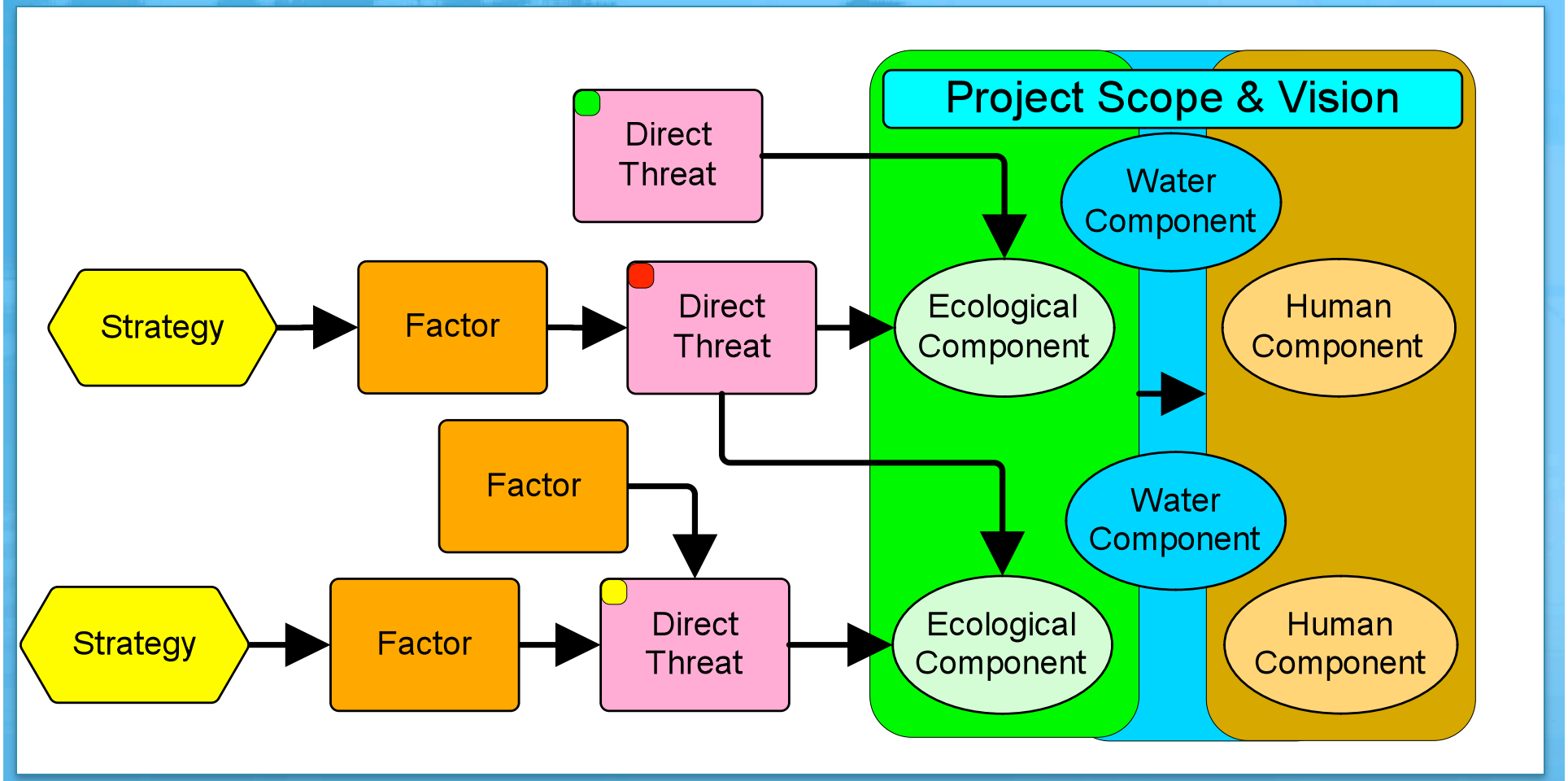
Step 2

Identify Factors/Drivers in "Initial Conceptual Model"



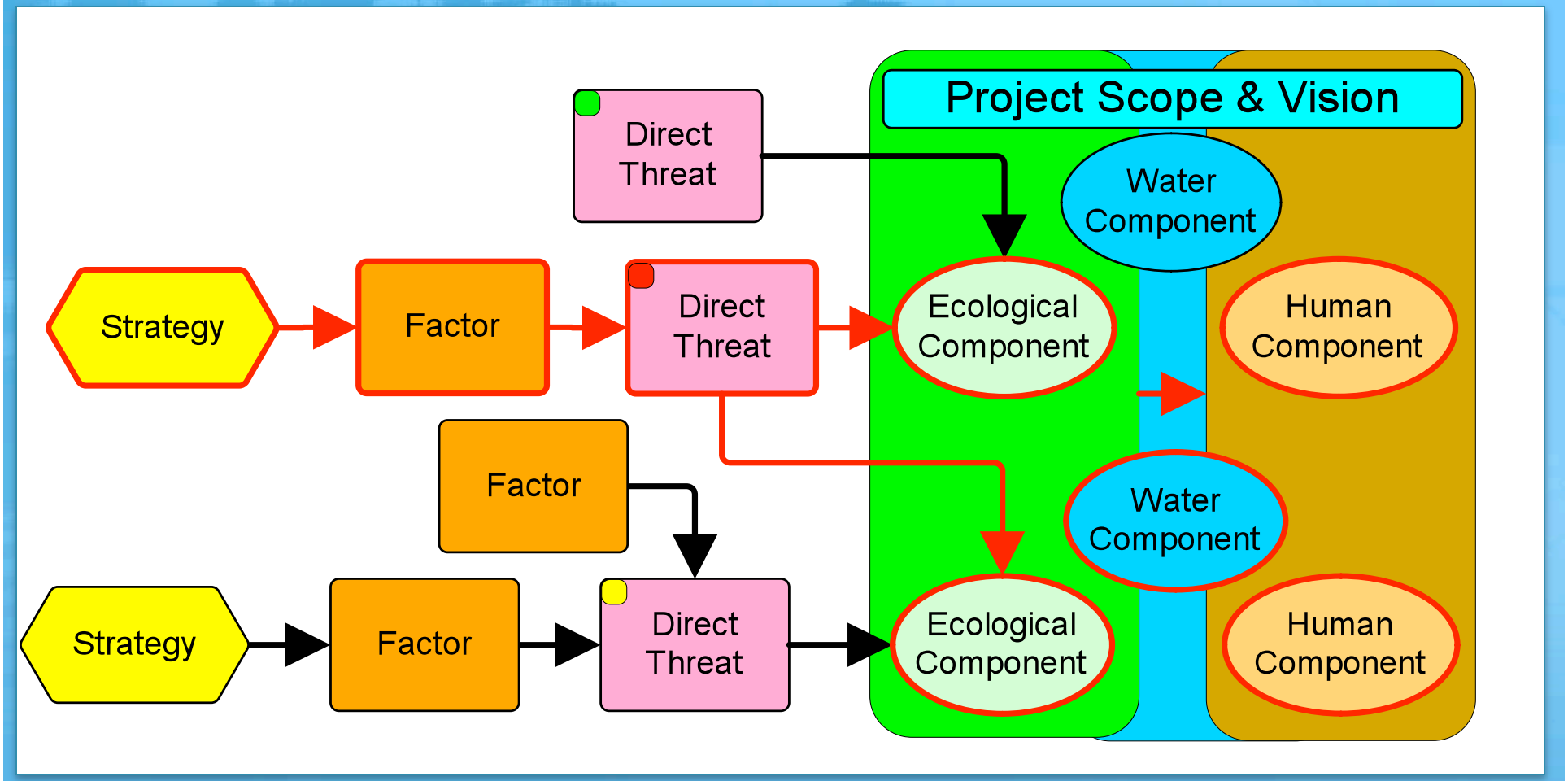
Step 2

Identify Strategies to Change Situation



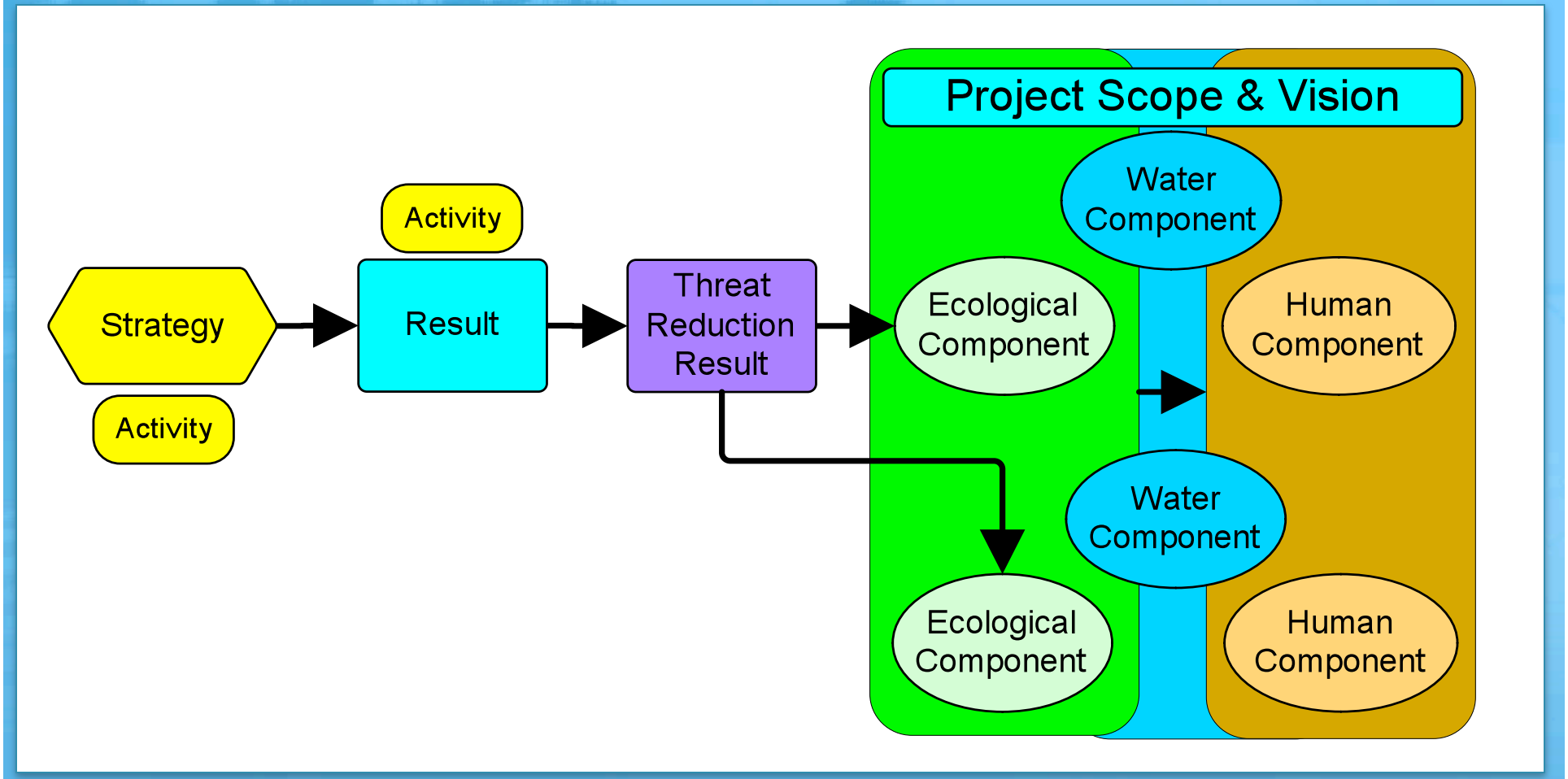
Step 2

Select One Strategy Chain



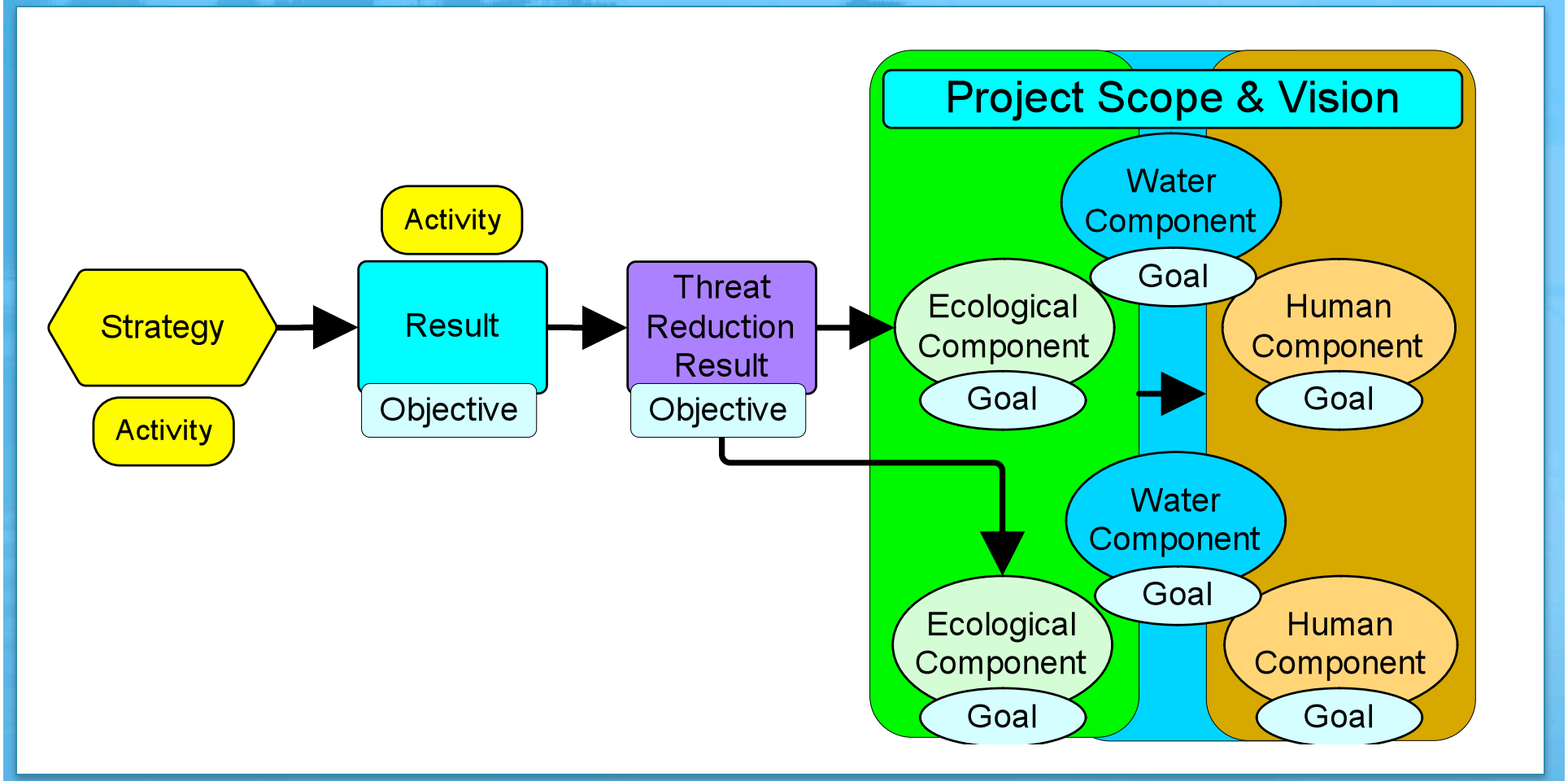
Step 2

Develop Results Chain for that Strategy



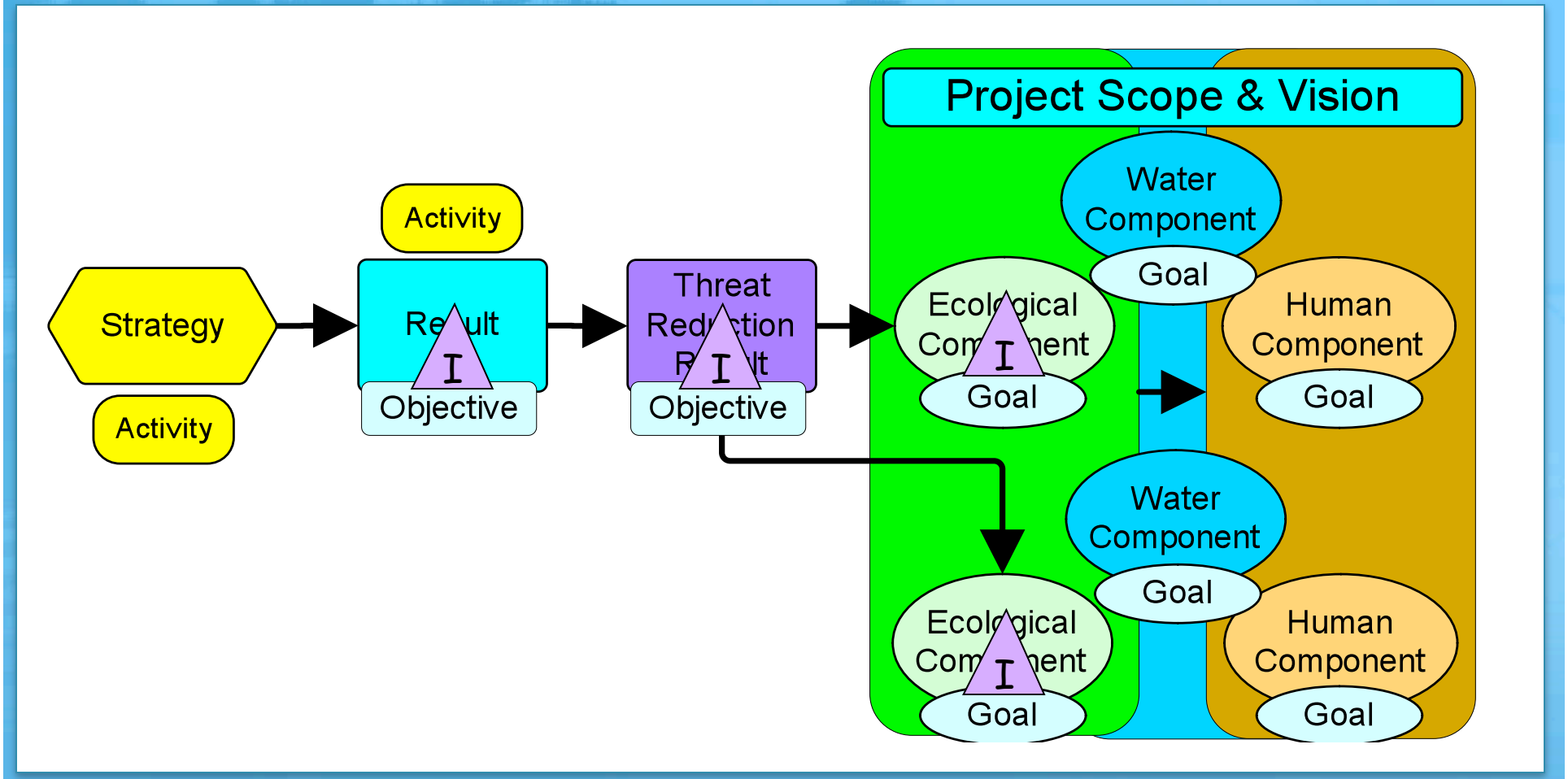
Step 2

Develop Measurable Goals & Objectives

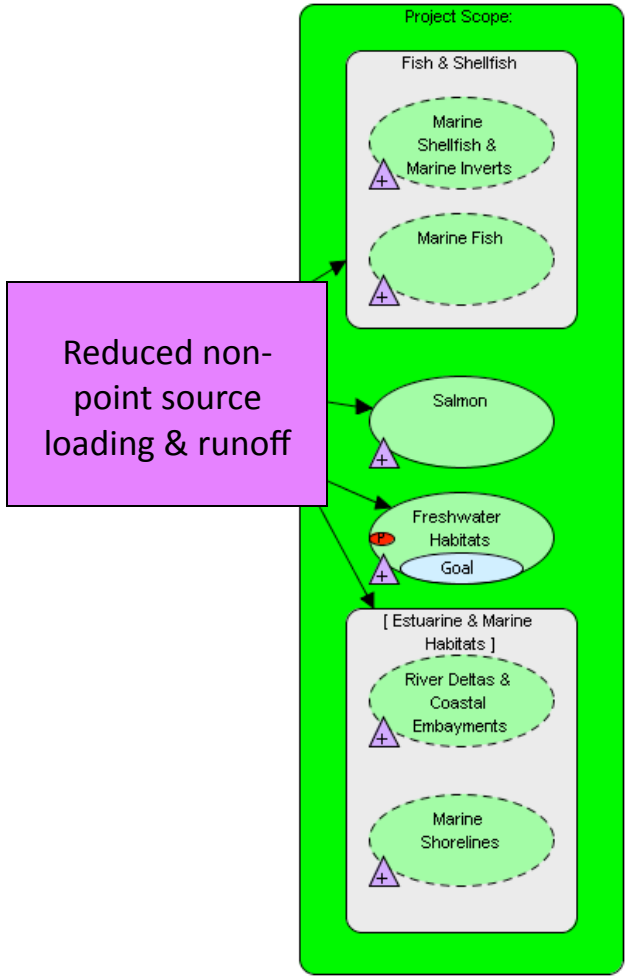


Step 2

Develop Effectiveness Indicators



One Example of a Results Chain from PS

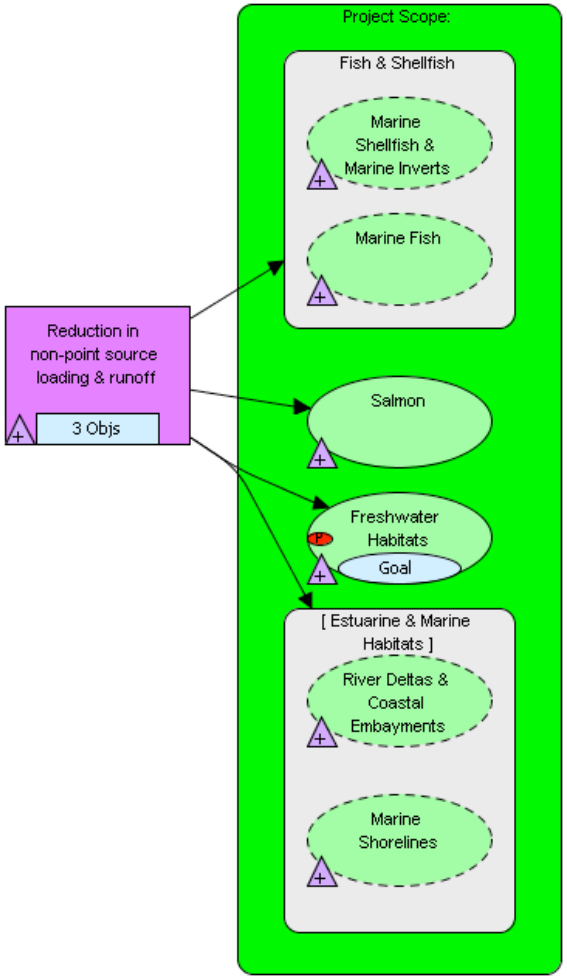


One Example of a Results Chain from PS

C2. Develop & implement LID incentives

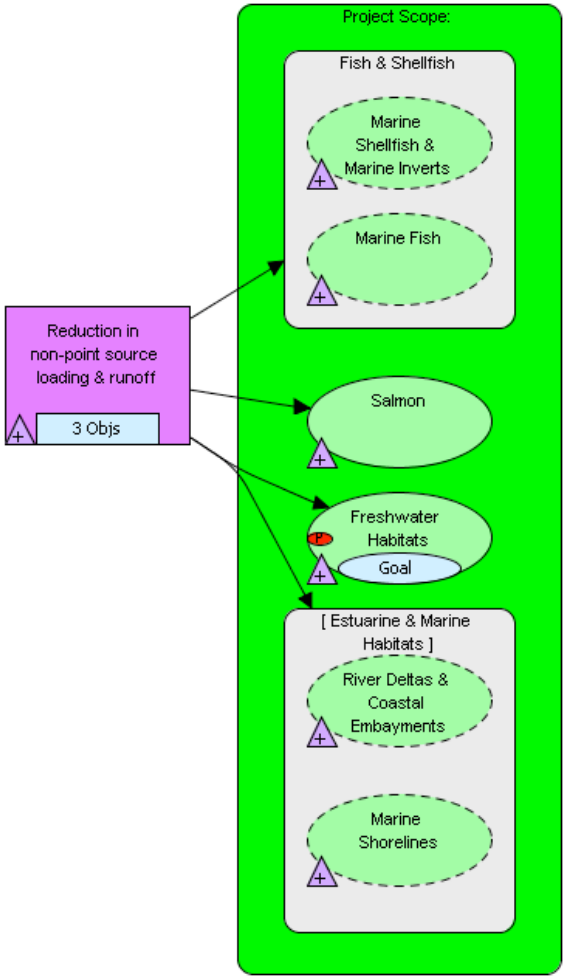
C2. Private stewardship & incentives for pollution prevention

C1. Public & business outreach to reduce pollutants



One Example of a Results Chain from PS

C2. Develop & implement LID incentives



One Example of a Results Chain from PS

Activity: Share guidance

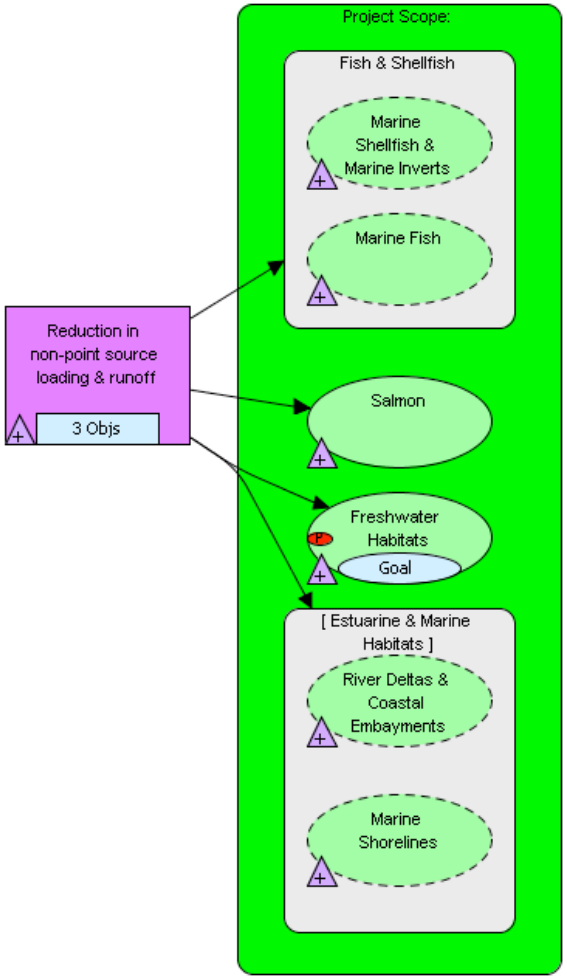
C2 Develop & implement LID

Activities: ID incentives

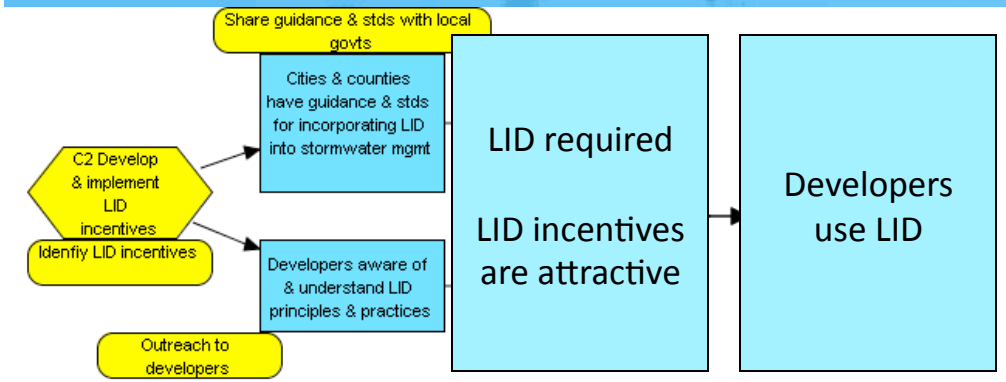
Outreach to developers

Cities & counties have guidance for incorporating LID into stormwater mgmt

Developers understand standards



One Example of a Results Chain from PS

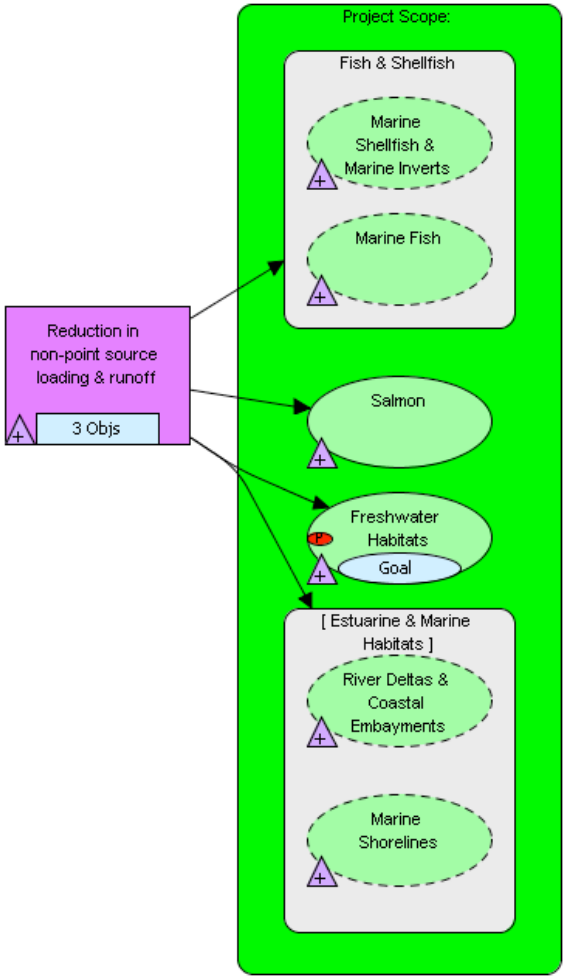


Objective for Result:
By 2010, at least 75% of counties & cities in PS require the use of LID technologies for new development & redevelopment

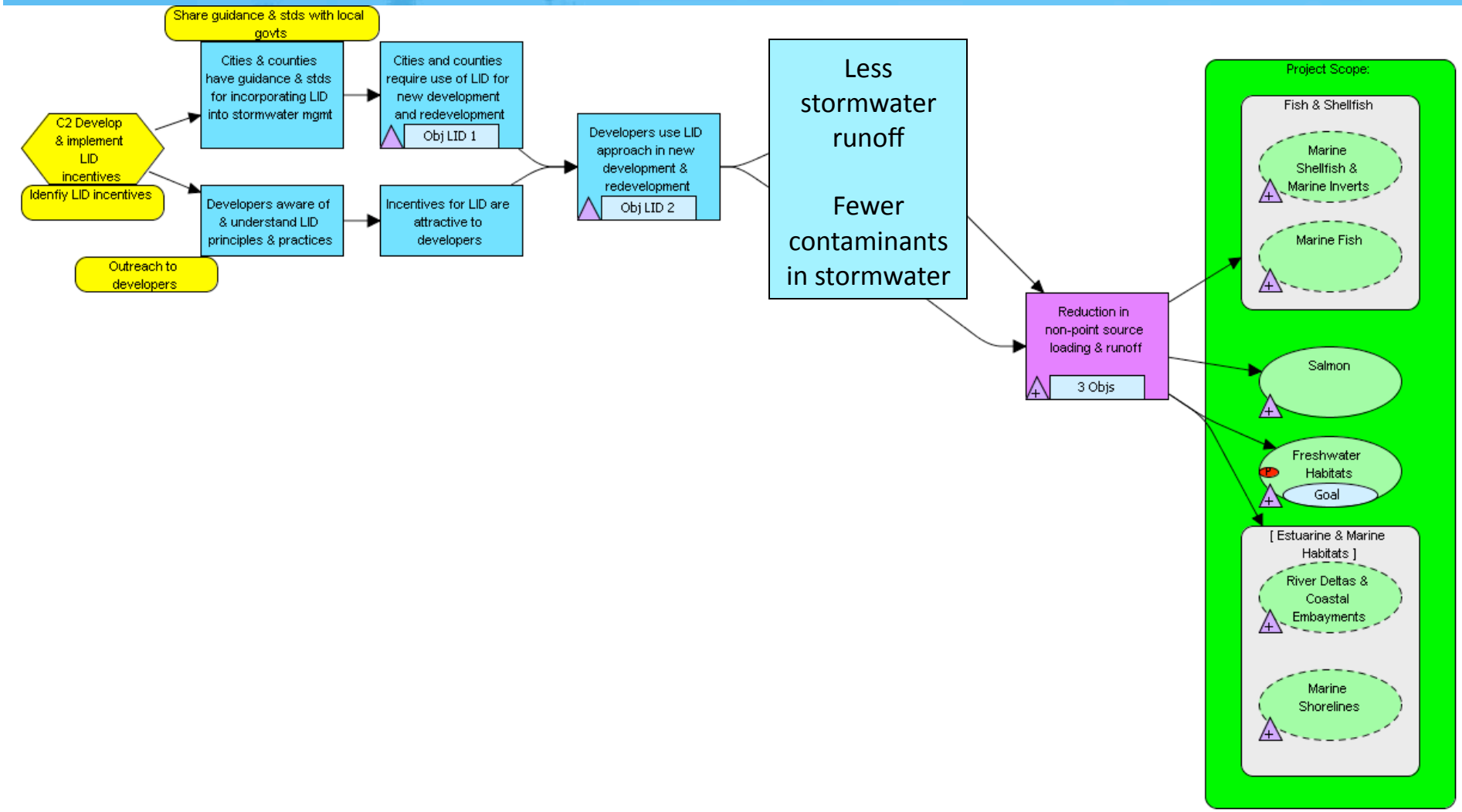
Indicator:
% of counties & cities that require use of LID technologies for new development & redevelopment

Objective for Result:
By 2012, all new development & redevelopment in counties and cities requiring LID technologies are actually using LID technologies

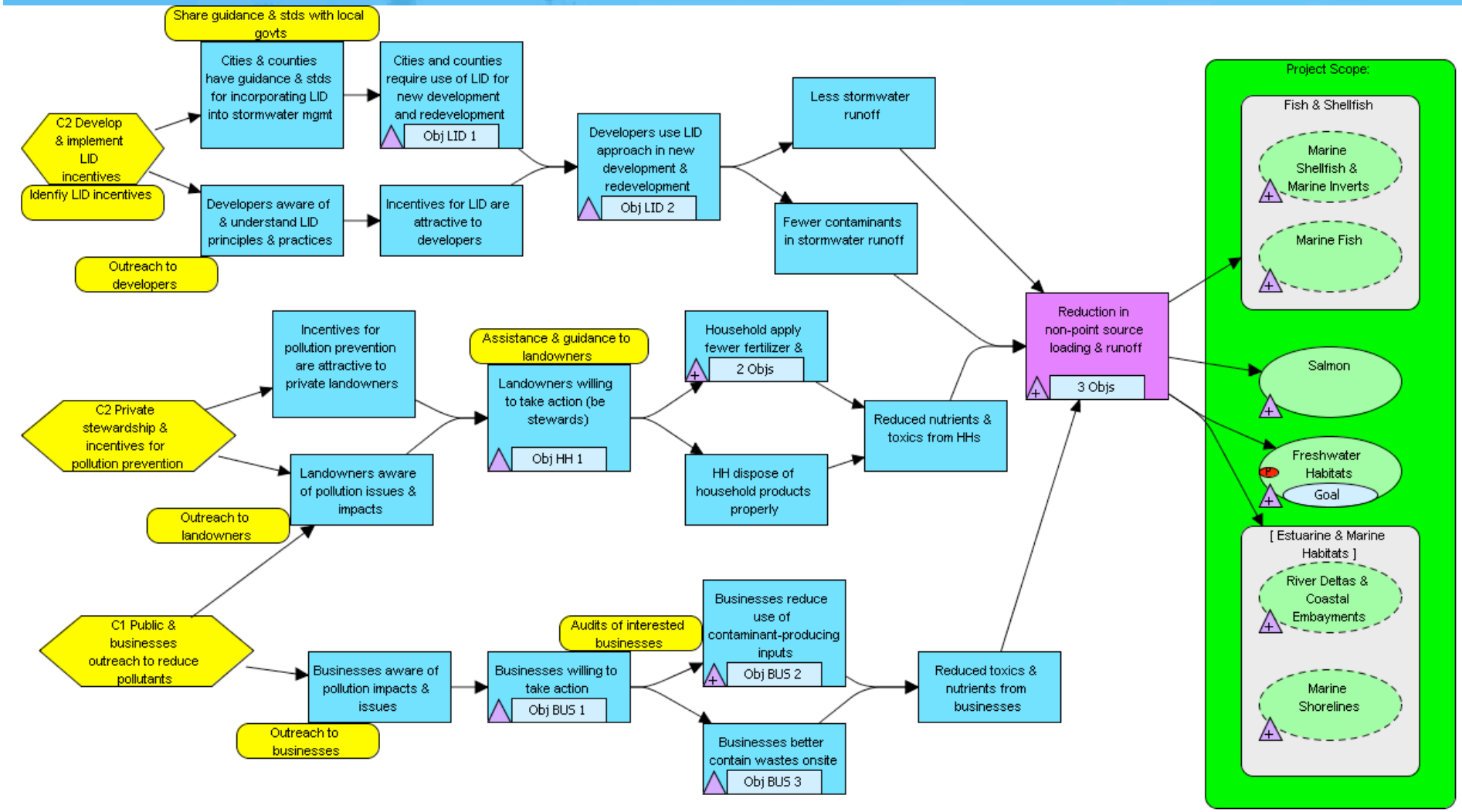
Indicator:
% new development & redevelopment in counties & cities requiring LID technologies that are actually using LID technologies



One Example of a Results Chain from PS



One Example of a Results Chain from PS



Candidate Threats for Development of Results Chains

- Residential/commercial/port/shipyard development
- Dams/levees/tidegates
- Invasives (aquatic and terrestrial)
- Non-point loading and runoff
- Roads/transportation/utility infrastructure
- Shoreline armoring
- Oil & hazardous spills
- Onsite sewage systems
- Water withdrawals and diversions
- Wastewater treatment plant discharge and CSOs

Step 2

Path Forward for Benchmarks "Effectiveness Indicators"

Today

LC Decision

- Confirm general plan

July - August

- Convene PMAG to provide oversight
- Give charge to effectiveness indicator workgroups to use Miradi tool to develop results chains, effectiveness indicators, and (where possible) recommend threat reduction objs

September - October

LC Decision

- Review results and confirm threat reduction objectives/benchmarks & recommend adjustments for alignment
- Develop November report

Elements of the November 1 "Product"

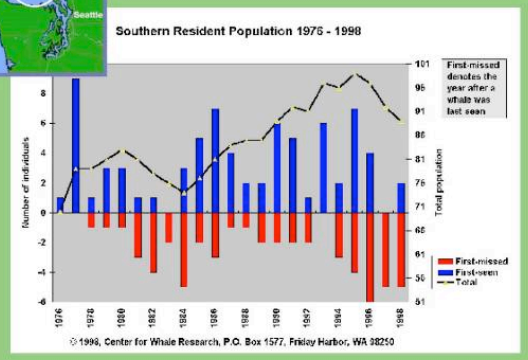
- Ecosystem status report organized by goals
- Key results chains and benchmarks for some intermediate outcomes
- Allocation of state dollars to near term actions by key results
- Recommendations by the Leadership Council for better alignment with the Action Agenda

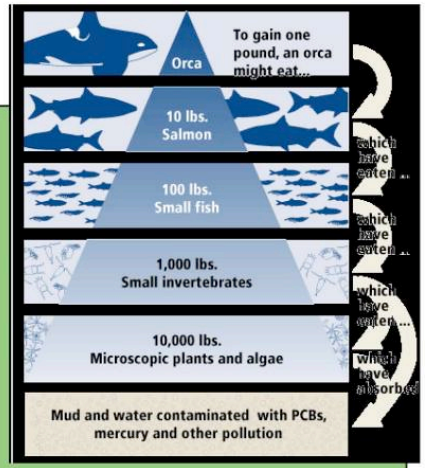
Rough Mockup of Report Page Showing Status of Marine Food Webs

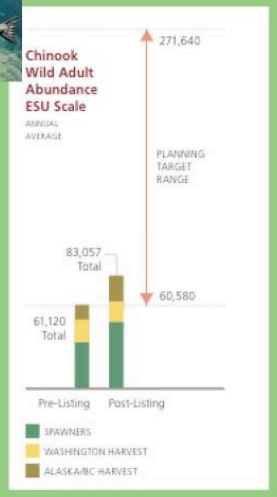
Species and Food Webs - *STATUS OF ORCA, SALMON FOOD WEB*

why is this important?

what is the status?







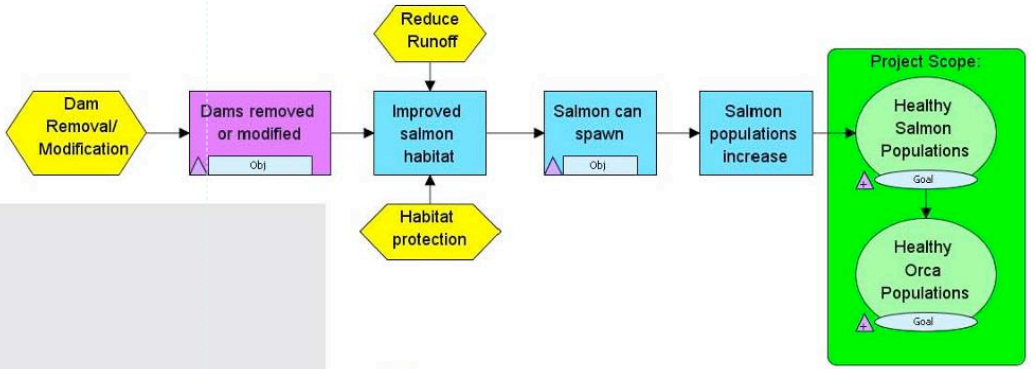
?

what do we still need to know about food webs?

Rough Mockup of Report Page Showing Effectiveness of Actions

Species and Food Webs -

what are we doing about it?



projects:
list prioritized by level of effort and visibility, include $?

stream miles connected
redds in target rivers
of juveniles
orcas

stories from the field...
on the ground project reporting

where do we go from here?

? *challenges/gaps in effectiveness knowledge*

Action Accountability Tracking 1.0

- Goal will be to collaborate with partners to identify actions, locations and expected results
- Will be initiated with a questionnaire to the lead implementer on each Near Term Action
- Will require discussion and negotiation
- Will provide the basis for reporting progress during the 2009-11 biennium

Roles of ECB & Its Members

- Help confirm “what we care about” and critical threats
- Align Bold Moves with priority results chains
- Provide significant input on “benchmarks”
- Provide significant input on adaptive management cycle
- Participate on the Performance Management Advisory Group (PMAG)

Roles of Science Panel & Its Members

- Confirm selection of indicators that best represent “what we care about”
- Help confirm ecosystem conceptual models
- Help identify and review conclusions about ecosystems indicators for 2009 reporting
- Help review ratings of ecosystem threats
- Review overall framework

Overall Timeline and Decision Points

July 30: ECB introduced to the Open Standards, discuss Bold Moves as results

Aug: Convene the Performance Management Advisory Group for biweekly meetings

Sept: Refinement based on ECB input; SP review ecosystem reporting conclusions' LC approves reporting indicators

Oct: Final review of results chains, benchmarks and conclusions

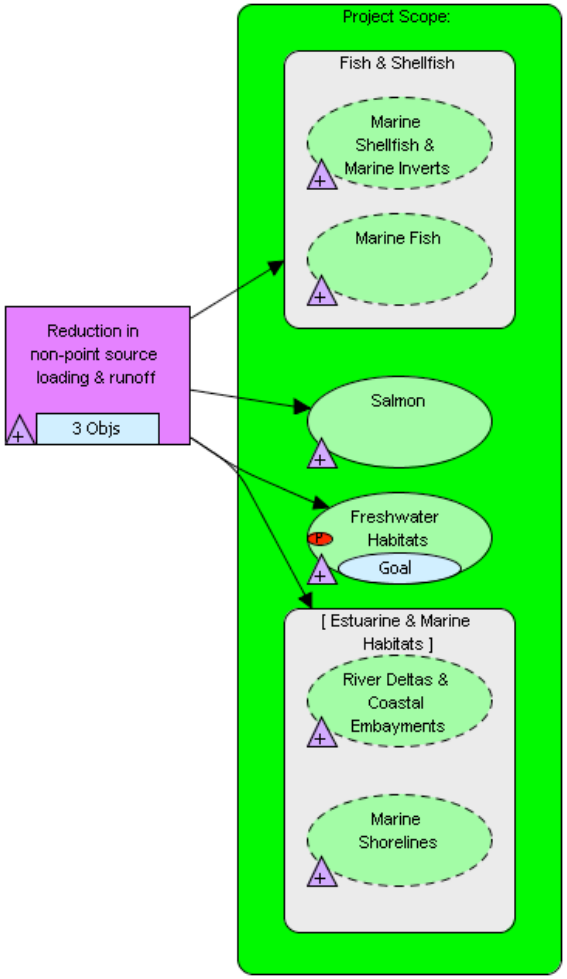
Nov: Publish and post State of the Sound Report

Nov +: Continued development

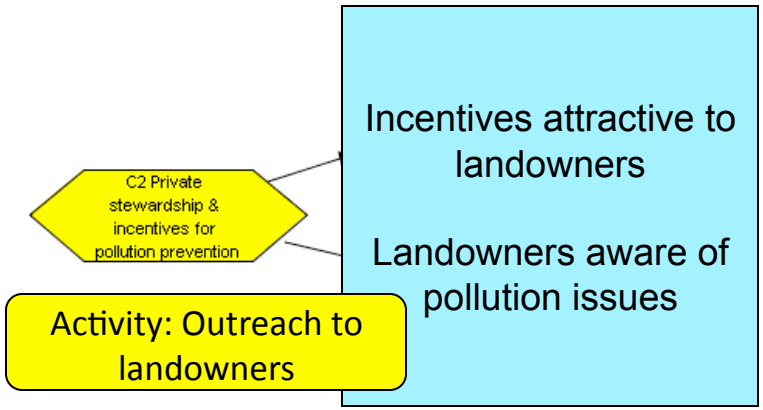

END
Thank you!

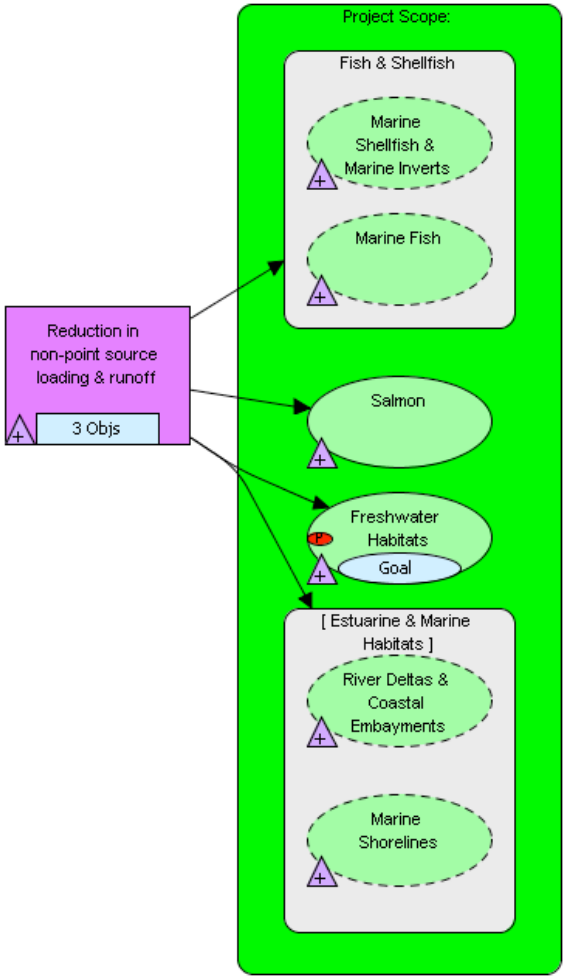
One Example of a Results Chain from PS

C2. Private stewardship & incentives for pollution prevention

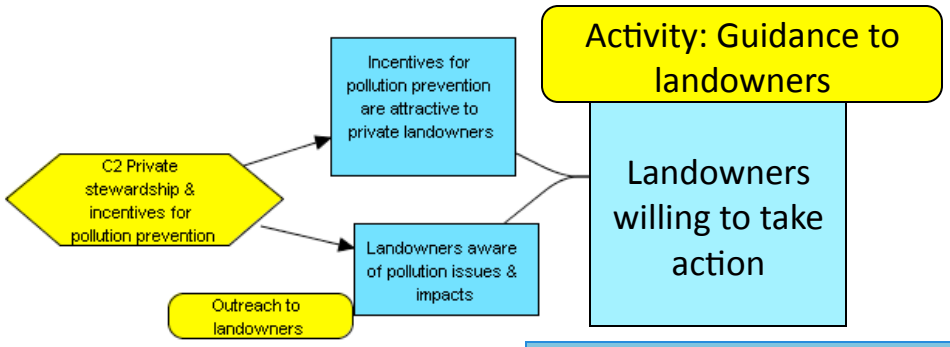


One Example of a Results Chain from PS



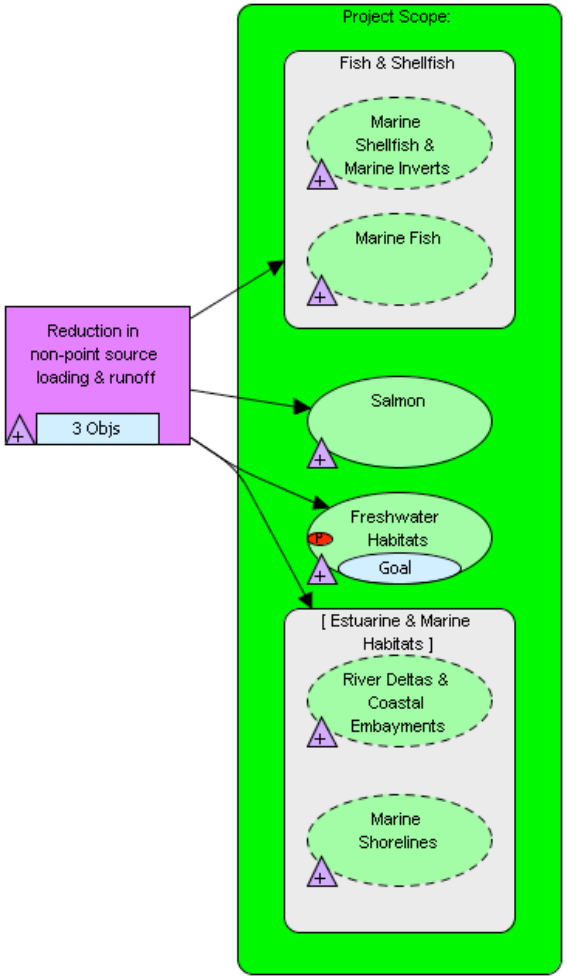


One Example of a Results Chain from PS

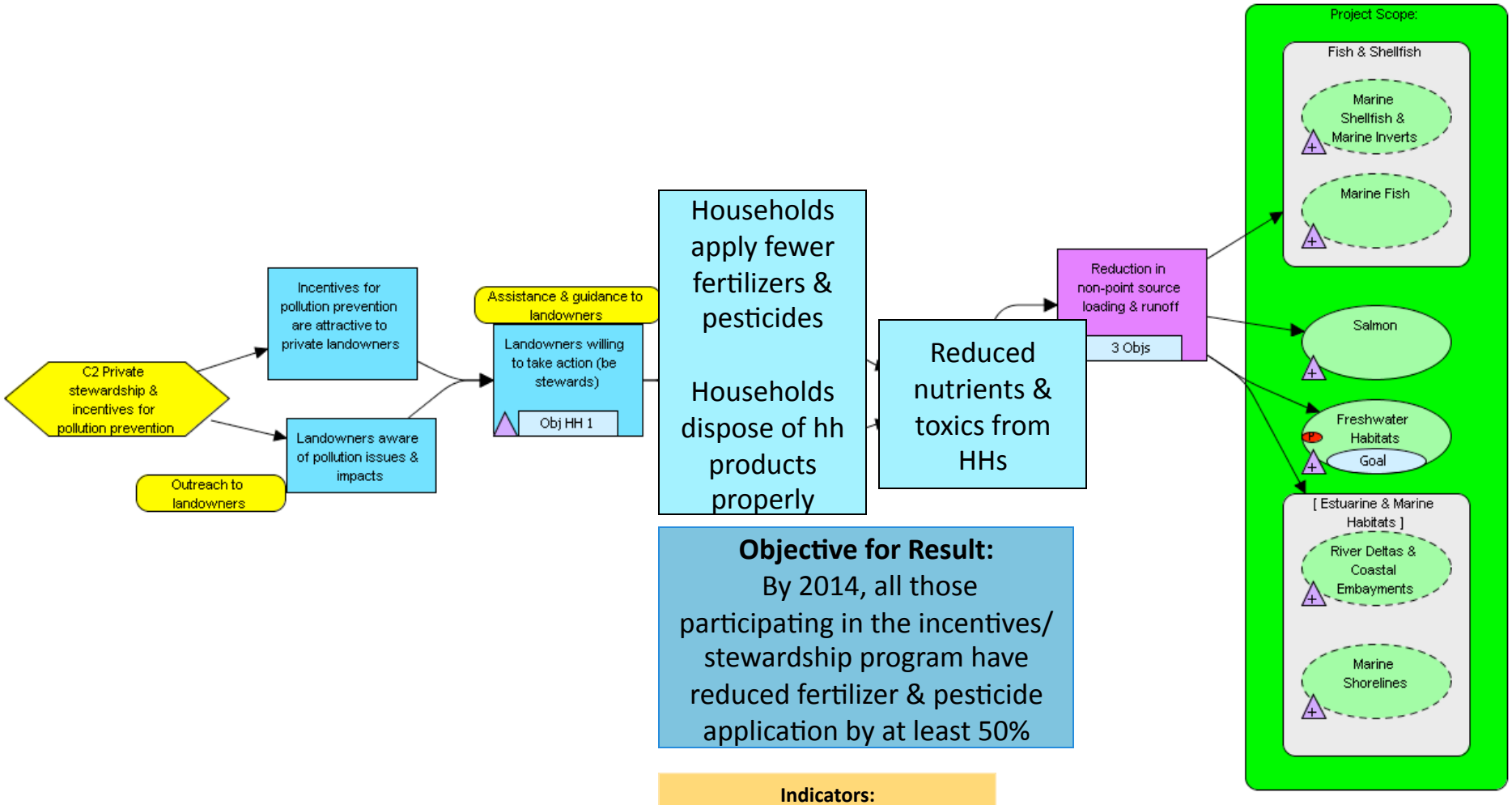


Objective for Result:
By 2011, at least 50 landowners with properties exceeding 100 hectares have signed up for stewardship/ incentive programs

Indicator:
landowners with properties exceeding 100 hectares who have signed up for stewardship/ incentive programs



One Example of a Results Chain from PS



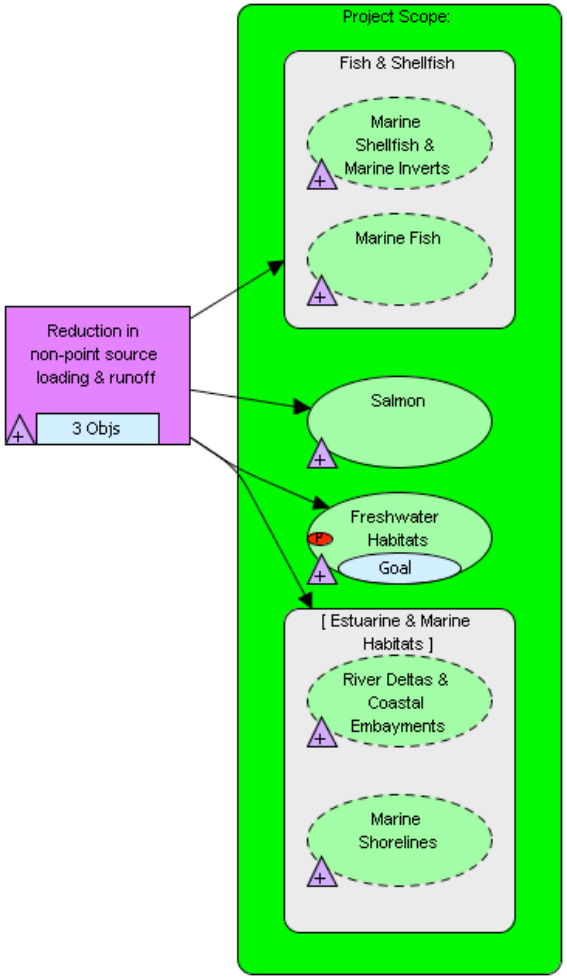
Objective for Result:
By 2014, all those participating in the incentives/ stewardship program have reduced fertilizer & pesticide application by at least 50%

Indicators:
% participants that have reduced fertilizer & pesticide application

% reduction of fertilizer & pesticide application (by HH)

One Example of a Results Chain from PS

C1. Public & business outreach to reduce pollutants



One Example of a Results Chain from PS

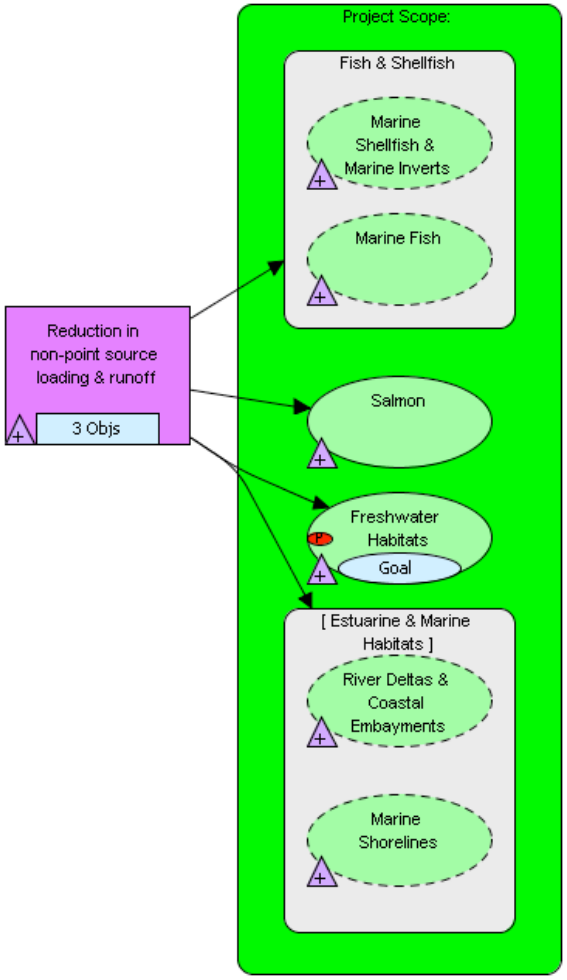
Objective for Result:
By 2011, at least 50 businesses across the Puget Sound scope have signed up for pollution prevention audits

Indicator
businesses that have signed up for pollution prevention audits

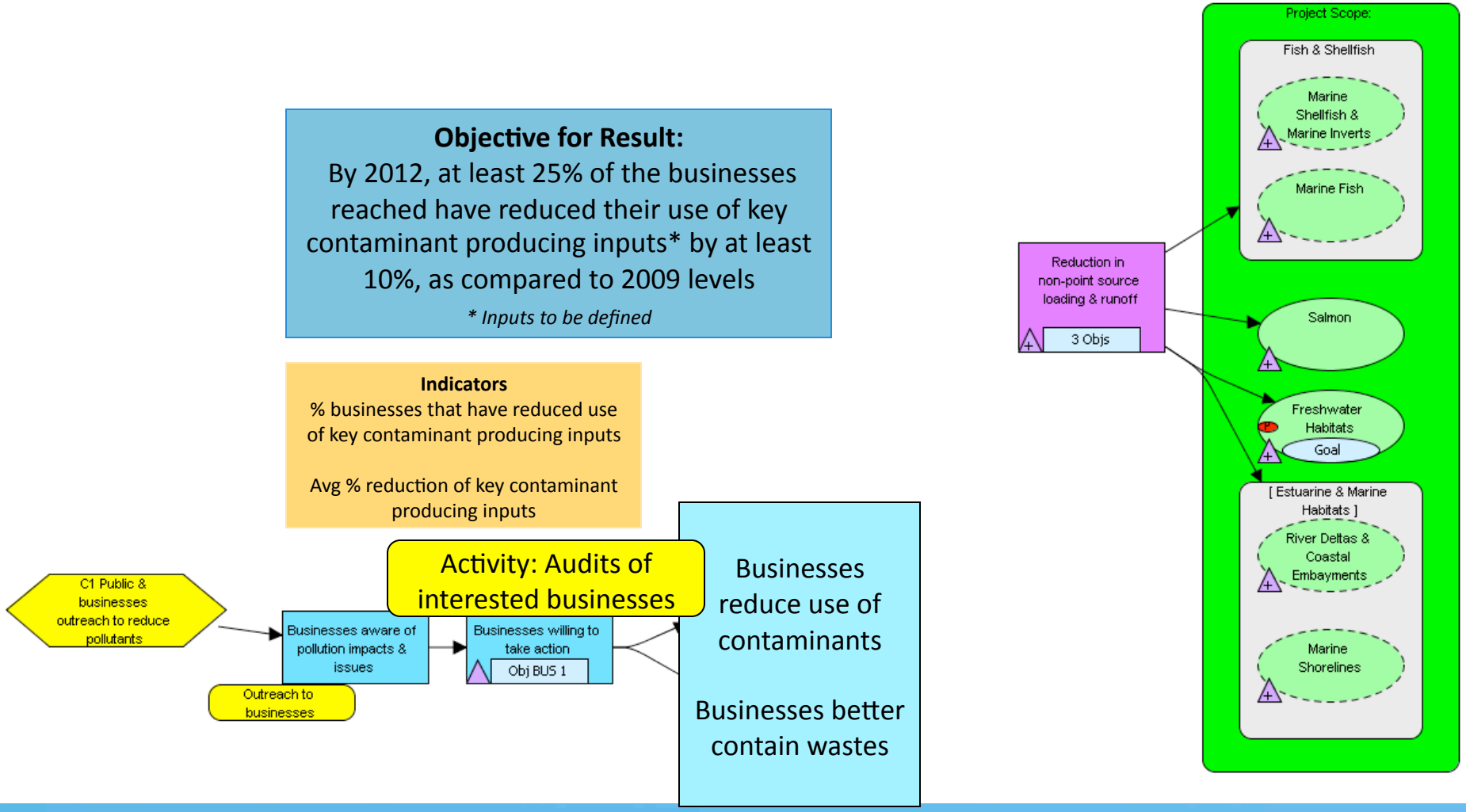
C1 Public & businesses outreach to reduce pollutants

Businesses aware of pollution & willing to take action

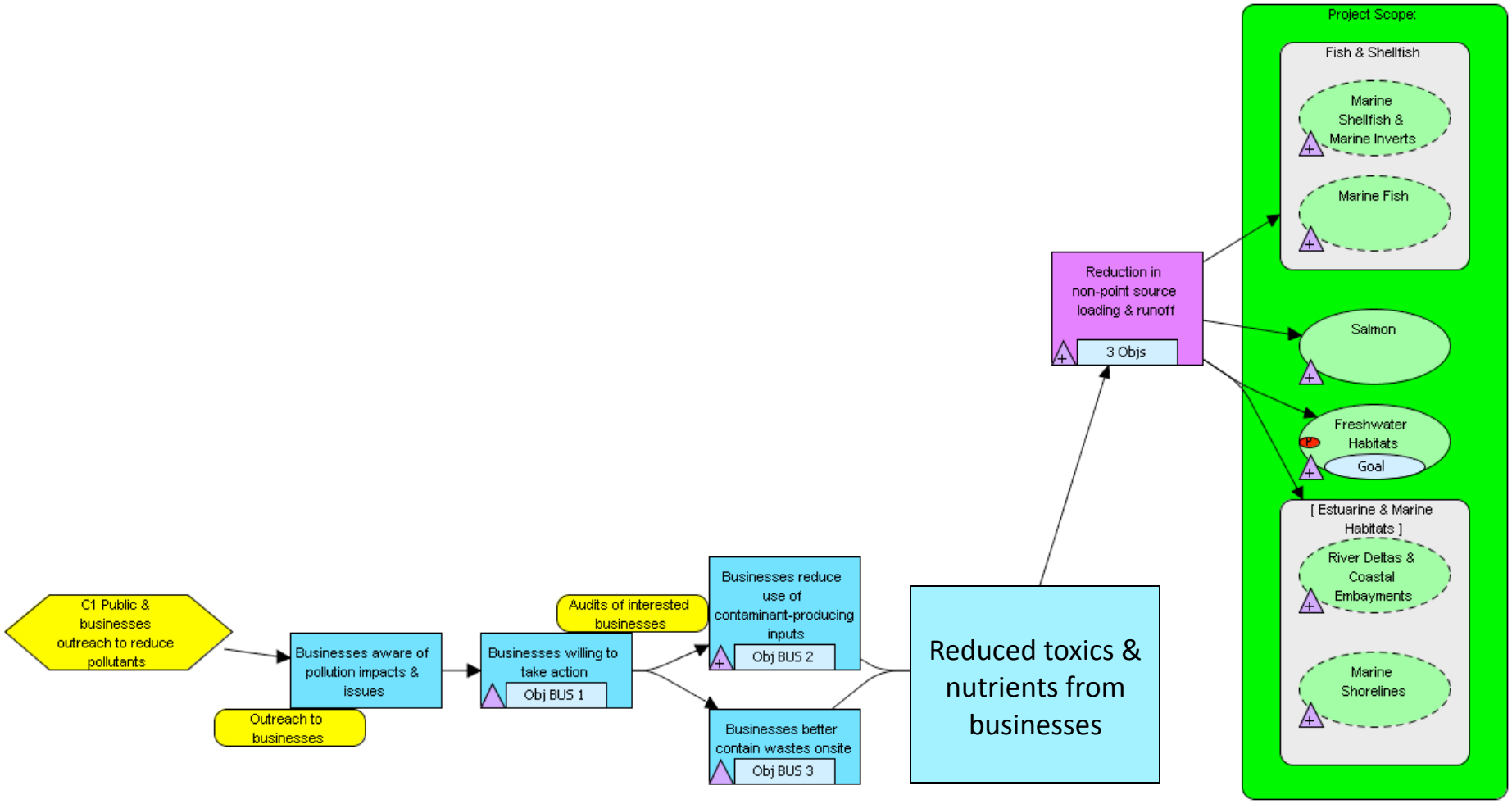
Activity: Outreach to businesses



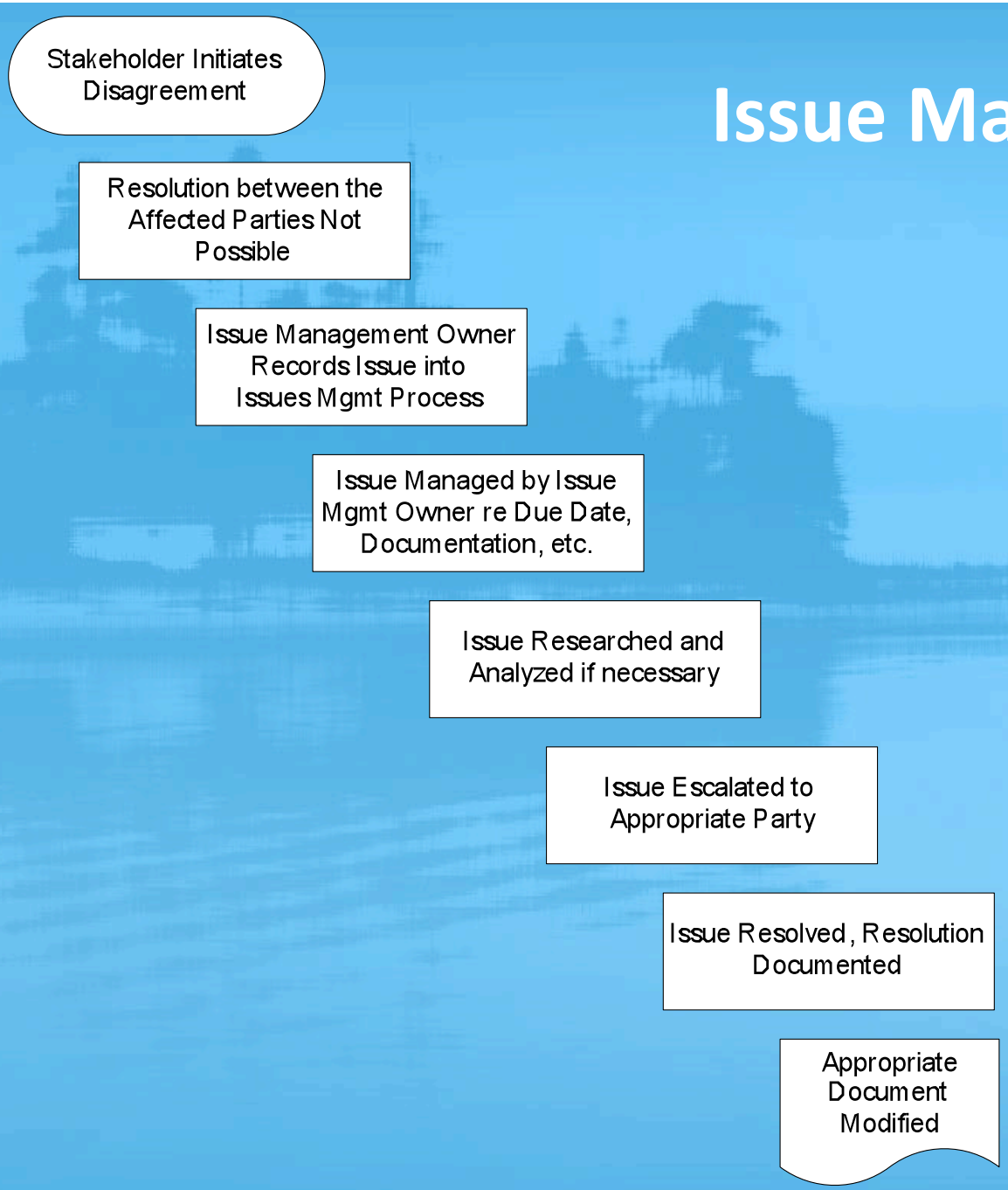
One Example of a Results Chain from PS



One Example of a Results Chain from PS



Issue Management Process



RACI task list

- LC
- ECB
- Science Panel
- Perf. Mgmt. Adv. Group
- PSP staff
- Partners
- Tasks: confirm scope, approve reporting indicators, desired future condition, results chains for Nov., objectives, some benchmarks, approve status report, write recommendations to leg to better align with AA

How do the processes support the science function of the Partnership?

- All three processes
- identify and document areas of uncertainty to guide research priorities
- are iterative and can incorporate and document change based on new scientific findings
- identify priorities for a monitoring plan to support the Action Agenda